



Electronic Wait List (EWL) for Scheduling and Primary Care Management Module (PCMM)

USER MANUAL

Patch SD*5.3*327

Disposition of EWL Entries and Transmission of New Background Messages to EWL Mail Group

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Introduction

This User Manual explains the enhancements made to the Electronic Wait List (EWL) by Patch SD*5.3*327. This patch is a part of the Electronic Wait List enhancements as identified through a list of requirements that the EWL User Group has validated and prioritized. Management of the EWL disposition process and its close relation to scheduled appointments are addressed in this patch. The functionality introduced by this patch applies to the existing EWL package in its current state. The Electronic Wait List sub-system is included in the Scheduling Re-hosting project that is in testing right now and the EWL features introduced in this patch are expected to be implemented in this Scheduling Re-hosting project as well.

The main purpose of this project is to speed up the disposition process of open EWL entries if a related appointment is scheduled and to alert the new EWL Mail Group: SD EWL BACKGROUND UPDATE, about the need for editing an EWL entry in response to a change in the status of its EWL type.

The new background job, SD EWL BACKGROUND JOB, should be scheduled to run nightly after the background job runs. Messages will be sent to the designated EWL Mail Group, SD EWL BACKGROUND UPDATE, if any of the follow scenarios exist:

1. If any closed entries in file EWL have pending appointments with a status of CANCELED BY CLINIC.
2. If Open Wait List entries are tied to a Clinic that is now inactive
3. If any PCMM Teams have been inactivated and have patients waiting on the Wait List
4. If any PCMM Positions have been inactivated and have patients waiting on the Wait List
5. If any patient on the Wait List had a Date of Death entered in error
6. If any PCMM Teams have open EWL entries waiting and now have open slots available
7. If any PCMM Positions have open EWL entries waiting and now have open slots available

Related Manuals

Related Manuals are located on the VistA Documentation Library website:

EWL Installation Guide – Original EWL Release patches SD*5.3* 263 & 264

EWL Release Notes– Original EWL Release patches SD*5.3* 263 & 264

EWL User Manual– Original EWL Release patches SD*5.3* 263 & 264

EWL Release Notes for Patch SD*5.3*327

Orientation

This user manual assumes that readers have a working knowledge of the EWL, PCMM GUI and VistA, VistA Scheduling, and other VistA software applications.

Please refer to the EWL User Manual (SD_53_P263_um.pdf) located on the VistA Documentation Library website for further instructions. Access for EWL is available within four separate programs: the EWL stand-alone program, in PCMM GUI, PCMM VistA, or in the Scheduling Appointment Management Module. The EWL protocols, on the Appointment Management menu, may also be added to a Patient Care Encounter (PCE) List Manager menu.

Use of the Software

Product Features

SD*5.3*327 introduces the following enhancements:

- A user interface to select open EWL entries by matching clinic, by matching specialty or all
- The ability to disposition a selected EWL entry and to update with data of the related appointment
- Optional selection of open EWL entries for marking with a non-removal reason
- The ability to display selected EWL entries with the Reopen Reason, appointment information, and the related comments if applicable.
- The new EWL background job includes:
 1. Identification of 'canceled' appointments used previously for disposition of the related EWL entries, and automatic change of the related EWL entry status to 'open'.
 2. Identification of the Date of Death change and update of the related EWL entry status accordingly.
 3. Identification of 'inactivated' clinics, teams, and positions used in open EWL entries with follow up notification sent to the EWL Mail Group.
 4. Generation of appropriate messages sent by Mail Man to the designated EWL Mail Group: SD EWL BACKGROUND UPDATE.
- A new report with EWL entries sorted by Reopen Reason.
- The ability to prompt for a new entry to the EWL if no appointment could have been selected from Action: Unscheduled Visit under Appointment Management.

Functional Changes Introduced with Patch SD*5.3*327

Call to EWL Entries from any Appointment Scheduling Process

The system generates a temporary file containing already-created appointments' data that will be compared with open EWL entries (if any exist). This file is used to display the created appointments at the end of their appointment entry process and during the optional EWL entry disposition process. If any open EWL entry has been identified by the system, a list of the created appointment(s) is displayed along with the following prompt:

```
Do you want to display open Wait list entries (Yes/No)?? YES// NO
```

If a user enters 'NO', then the whole process with EWL entries is bypassed and the appointment entry process continues.

If the user enters 'YES', then the potential EWL entry disposition process will start

The following Appointment Menu options are used to schedule appointment(s) and are involved in this process:

```
Appointment Management:
```

```
Action: Make appointment
```

```
Action: Unscheduled Visit
```

```
Multiple Appointments Booking
```

The system determines if any open EWL entries exist for a patient. An optional temporary file, ^TMP(\$J, "APPT",SCNT), with appointment(s) characteristic data is generated only if at least one open EWL entry exists. (SCNT represents a sequence number used for interactive communication with the system.) A summary of created appointment(s) is displayed only if the patient has an open EWL entry

Display of open EWL entries with Potentially Matching Appointments

If the default "YES" is accepted, the following prompt allows for selection of type of open EWL entries to be displayed:

```
Do you want to display open Wait list entries (Yes/No)?? YES//
```

```
Display Open Wait List entries selection:
```

```
'A' for ALL entries
```

```
'C' for matching Appointment CLINIC
```

```
'S' for matching Appointment SPECIALTY
```

```
'^' to Quit
```

```
SELECT:
```

If a desired selection does not provide any listing then a message is displayed:

```
No selected open EWL entry has been found!
```

Another selection may be made. Any time a user may 'quit' to exit from the EWL disposition process.

If a selection exists, the system creates a temporary file ^TMP(\$J,"SDWLPL",SCN) with all identified open EWL entries listed in sequence order 'SCN' for a potential interactive selection. The created appointment(s) are displayed again for easy matching to the opened EWL entries selected.

Example:

Appointment(s) for: EWLPATIENT, ONE in Clinic: CECELIA'S CARDIOLOGY

Specialty: X-RAY

Station: 500GA

	Appt Date/Time	Status	Appt Type	Institution
1	APR 01, 2005@10:00	INPATIENT	REGULAR	ALBANY
2	APR 05, 2005@11:00	SCHEDULED	REGULAR	ALBANY

=====
All Open Wait List Entries for: EWLPATIENT, ONE 000-43-4343

	EW List Type	P	Waiting for Institution	Orig Date	By	Des. Dat	Reopen
1.	PCMM TEAM	F	ONE	ALBANY	07 Mar 05	07 Mar 05	
	Comment: test 2						
2.	SERV/SPECIAL A		NEUROLOGY	ALBANY	07 Mar 05	PRO 07 Mar 05	CA
	Comment: this is a regular comment						
	Reopen: Reopen comment						
3.	CLINIC	A	CARDIOLOGY	ALBANY	07 Mar 05	PAT 07 Mar 05	DE
	Comment: Please follow up						
	Reopen:						

The Reopen column represents the following set of codes from the Reason field (#29).

CC: INACTIVATED CLINIC
CA: CANCELED APPOINTMENT
DE: DATE OF DEATH ERROR
O: OTHER

Note: The CC: INACTIVATED CLINIC code is reserved for future functionality that will allow users to manually reopen an EWL entry, i.e., the CC code will not be utilized in this patch (SD*5.3*327), but will be utilized in a future patch. To inactivate a clinic, you have to cancel all appointments created for that clinic, and EWL entries related to those appointments closed by the clinic are reopened by the nightly background job and are indicated by code 'CA', please see above.

Optional Entry of Non-Removal Reasons on Open EWL Entries

Following the displayed open EWL entries, a user makes a decision whether to disposition an entry. If the default 'NO' is accepted then an optional non-removal reason may be entered for the selected entry.

DO YOU WISH TO REMOVE ANY ENTRY FROM LIST (Yes/No)?? NO//

Select entries for entering Non-Removal Reason or '^' to Quit>: (1-3): 1,3

Select one of the following:

- 1 APPOINTMENT CRITERIA NOT MET
- 2 PATIENT WANTS ANOTHER APPOINTMENT
- 3 PROVIDER WANTS ANOTHER APPOINTMENT
- 4 OTHER
- 5 QUIT

Select one of the following reasons for #: 1:

A prompt for a non-removal reason is repeated for each selected entry, in this example for #3.

Closing EWL Entry – Optional Default Update with Appointment Data

If a user decides to disposition any of the open EWL entries based on comparison of scheduled appointment(s) to the list of 'open' EWL entries, 'YES' has to be entered in response to the prompt:

DO YOU WISH TO REMOVE ANY ENTRY FROM LIST (Yes/No)?? NO//YES

Select entries for disposition '^' to Quit>: (1-3): // 2,3

Disposition Reason for # 2:

D DEATH
NC REMOVED/NON-VA CARE
SA REMOVED/SCHEDULED-ASSIGNED
CC REMOVED/VA CONTRACT CARE
NN REMOVED/NO LONGER NECESSARY
ER ENTERED IN ERROR
Q QUIT/DO NOT DISPOSITION

Enter selection or <CR> to accept 'SA REMOVED/SCHEDULED-ASSIGNED'> : SA//

If a default 'SA' is accepted then a list of the just-scheduled appointments is displayed again for matching with the EWL entry to be closed.

REMOVED/SCHEDULED-ASSIGNED

Appointment(s) for: EWLPATIENT, ONE in Clinic: CECELIA'S CARDIOLOGY

Specialty: X-RAY

Station: 500GA

Appt Date/Time	Status	Appt Type	Institution
1 APR 01, 2005@10:00	INPATIENT	REGULAR	ALBANY
2 APR 05, 2005@11:00	SCHEDULED	REGULAR	ALBANY

Select appointment entry for Removal Reason or '^' to Quit>: (1-2): //1

The EWL entry is closed with updates from the selected appointment and a message is displayed:

*** Patient has been removed from Wait List ***

New procedures initiated daily from the EWL Background Job

One background job was added to patch SD*5.3*327:

SD EWL BACKGROUND JOB

Description: Routine SDWLQSC will run in the background as scheduled daily by the site. This background job will be used to determine if any of the changes described below have occurred. The appropriate messages will then be sent to the EWL User Group: SD EWL BACKGROUND UPDATE.

Appointments Canceled by Clinics

Has any appointment been canceled by a clinic, where that appointment was used to close an EWL entry? If 'Yes' (closed based on **SA -REMOVED/SCHEDULED-ASSIGNED REASON**) then:

- The EWL entry is opened with the Reopen Reason: 'CA' and the Reopen Comment field may be populated by users in the future when a patch to allow editing of an EWL entry's Reopen Comments is implemented.
- The following MailMan message will be generated and sent to members of the EWL Mail Group: SD EWL BACKGROUND UPDATE:

Subj: EWL appointment entries with a status of 'CANCELED BY CLINIC'.
[#174282] 04/25/05@08:48 8 lines
From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays any entries in file EWL that have pending appointments with a status of 'CANCELED BY CLINIC', there may be further action required if the patient still needs an appointment.

PATIENT NAME	CLINIC	DATE/TIME of APPT
EWLPATIENT, TWO	STARTEST	APR 27, 2005@13:00

Note: An original appointment may be canceled and another one created the next day (or another day in the future) for the same date and time as the original appointment. Regardless if the clinic on the original appointment and the clinic on the new appointment are the same or not, the corresponding EWL entry that was tied to the original appointment will be open.

Inactivated Clinics

Has any Clinic used by an EWL entry been inactivated? To inactivate a clinic all appointments scheduled for that clinic must be canceled.

If 'Yes' and the EWL entry is closed (i.e. has a scheduled appointment), no action is taken.

If 'Yes' and the EWL entry is open (i.e. does not have a scheduled appointment), then the following Mail Man message should be sent to the EWL Mail Group:

Subj: INACTIVE CLINICS with OPEN WAIT LIST entries. [#174315]
04/25/05@13:35 8 lines
From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays the number of open Wait List entries that are tied to an Inactive Clinic. These Wait List entries may require further action, please review.

CLINIC and NUMBER of WAIT LIST entries

PRIMARY CARE	3
AUDIOLOGY	1
STARTEST	1

Inactivated Teams

Has any Team used by EWL entry been inactivated? If 'Yes' and the EWL entry with this team is open, a Mail Man message should be generated and sent to the EWL Mail Group, for example:

Subj: Wait List PCMM Inactive Team Report [#174431] 04/26/05@15:23
5 lines

From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays any PCMM Teams that have been inactivated
and have patients waiting on the Wait List. The PCMM Teams
are displayed along with the number of open Wait List entries.

GREEN TEAM 1 10

Inactivated Positions

Has any Position used by EWL entry been inactivated? If 'Yes' and the EWL entry with this position is open, a Mail Man message should be generated and sent to the EWL Mail Group for example:

Subj: Wait List PCMM Inactive Position Report [#176004]
05/17/05@12:16 7 lines

From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays any PCMM Positions that have been inactivated
and have patients waiting on the Wait List. The PCMM Positions
are displayed along with the number of open Wait List entries.

Team Position	Team	Open EWL Entries
LPN NURSE	GREEN TEAM 1	9

Date of Death Entered in Error

Has any Date of Death been entered by error e.g. the EWL entry is closed and marked with
D - Disposition Reason while the patient does not have Date of Death in her/his record?

If 'Yes,' the EWL entry opens with the Reopen Reason 'DE' – Date of Death Error,
a related Mailman message is generated:

Subj: Wait List Date of Death Error Report [#174398] 04/26/05@14:29 5
lines

From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays any patient on the Wait List who had
a Date of Death entered in error. The Wait List entry is
reopened and may require additional follow-up.

EWLPATIENT, THREE

Team and/or Positions available in PCMM - Notifications Sent to EWL Mail Group

If either a Team or a Position becomes open by spots becoming available and they are in open status on the EWL the following messages are sent to the EWL Mail Group:

Subj: PCMM Team Report of Available Slots [#174284] 04/25/05@08:48 10 lines

From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays any PCMM Teams that have open EWL entries waiting - and now have open slots available. Message displays PCMM Team and number of open slots and number of EWL entries waiting for that PCMM Team.

TEAM	SLOTS AVAILABLE	EWL ENTRIES
GREEN TEAM 1	70	19
GREEN TEAM 6	10	1
BLUE TEAM	200	1

or

Subj: PCMM Positions Report of Available Slots [#174484] 04/27/05@07:47 8 lines

From: POSTMASTER In 'IN' basket. Page 1 *New*

This message displays any PCMM Positions that have open EWL entries waiting - and now have open slots available. Message displays PCMM Position and number of open slots and number of EWL entries waiting for that PCMM Position.

POSITION	TEAM	SLOTS AVAL	EWL ENTRIES
LPN NURSE	GREEN TEAM 1	200	9

EWL Reopen Reason Report

The following template-driven report is available from OPTION:

SD WAIT LIST REOPEN ENTRIES.

This stand alone option is also available as EWL Reopened Entries from Menu:

SD WAIT LIST REPORTS MENU

(Wait List (Sch/PCMM) Reports):

- 1 Appointment (Sch/PCMM) Wait List Report
2 PCMM Team/Position Wait List (Sch/PCMM) Report
3 Overdue Appointment Wait List(Sch/PCMM) Report
4 Wait List (Sch/PCMM) Statistic Report
5 Enrollment Wait List (Sch/PCMM) Statistic Report
6 **EWL Reopened Entries**

```
Select OPTION NAME: SDWL REOPEN EWL ENTRIES          EWL REOPENED ENTRIES
SD WAIT LIST REOPEN ENTRIES          EWL Reopened Entries
```

EWL REOPEN REASON APR 26, 2005 09:16 PAGE 1

EWLPATIENT, SIX		REOPEN REASON: CANCELED APPOINTMENT	
EWL TYPE: SERVICE/SPECIALTY		DESIRED DATE: AUG 21, 2003	
APPT: PRIMARY CARE TEAM 1	MAY 6, 2005 09:00	Canceled by Clinic	
REOPEN COMMENTS:			

EWLPATIENT, SEVEN	REOPEN REASON: OTHER
EWL TYPE: SPECIFIC CLINIC	DESIRED DATE: DEC 10,2004
APPT:	
REOPEN COMMENTS:	

EWLPATIENT, ONE	REOPEN REASON: CANCELED APPOINTMENT
EWL TYPE: SPECIFIC CLINIC	DESIRED DATE: JAN 5,2005
APPT: STARTEST	APR 27, 2005 13:00 Canceled by Clinic
REOPEN COMMENTS:	

EWL Entry Called from the Unscheduled Visit

(within Appointment Management option)

The ability to prompt a user for an entry in the Electronic Wait List existed prior to this patch, but only under the Making Appointment option. This feature was not previously available under the Unscheduled Visit process. If you were unable to enter/schedule an appointment for the

selected clinic or date the program exited the menu. The problem is addressed with the following functionality:

```
Select Action: Quit// UN    Unscheduled Visit
Select Clinic: CE
    1    CECELIA'S CARDIOLOGY
    2    CECELIA'S EXTRA CLINIC
    3    CECELIA'S GEN MED
    4    CECELIA'S OPHTHAL
CHOOSE 1-4: 2    CECELIA'S EXTRA CLINIC

: NOW//    (MAR 29, 2005@15:51)
    o    Clinic does not meet on this date!

APPOINTMENT TIME: NOW// ^
DO YOU WISH TO PLACE THIS PATIENT ON A WAITING LIST? No//    (No)
or
DO YOU WISH TO PLACE THIS PATIENT ON A WAITING LIST? No// Y    (Yes)
                                Wait List Enter/Edit
    EWL PATIENT, SIX                                000-44-4056

Patient currently is on Waiting List for the Following

#    Wait List Type                                P                                Waiting    For
Institution                                Date Entered
1.    SPECIFIC CLINI    F    CECELIA'S EXTRA CLI                                ALBANY    032905
Select Wait List (1) or Enter 'N' for New or '^' to Quit ?
```

SD WAIT LIST DISPLAY

The modified display includes appointment information and the Reopen Reason (if any exist). The Wait List Display will include additional information related to an appointment used as a reason for closing the entry, please see below:

```
Do You Want to View Only 'OPEN' Wait Lists? Yes//

#    1
```

Wait List - SERVICE/SPECIALTY
PRIMARY CARE/MEDICINE
Institution - CHEYENNE VAMROC
Entered by - EWL PATIENT, TWO
Requested By - PATIENT
Comments - inexact date entered
Date Entered - 09/23/03
Date Desired - 12/00/03

2
Wait List - SPECIFIC CLINIC
STARTEST
Institution - WILMINGTON VAMROC
Entered by - EWL USER, ONE
Requested By - PATIENT
Reopen Reason: CANCELED APPOINTMENT
Disposition -
Dispositioned by -
Appointment scheduled for APR 27, 2005@13:00
Made on: APR 25, 2005 For clinic: STARTEST
Appt Institution: WILMINGTON VAMROC Appt Specialty: ADMITTING/SCREENING
Appointment Status: Canceled by Clinic
Date Entered - 01/03/05
Date Desired - 01/05/05
Disposition Date -

Glossary

APPOINTMENT	A meeting with a provider or a clinic; currently an appointment is entered for a clinic and it may be scheduled or entered in the past as already kept.
CREDIT STOP CODE or SECONDARY SPECIALTY	Optional code assigned to a clinic and representing secondary specialty if any.
DISPOSITION/CLOSE of EWL entry	Changing the Current Status field of open EWL entry from 'open' into 'closed'. There are several coded reasons, identified by the Disposition field of the SD WAIT LIST file.
ENTER APPOINTMENT	Actions executed in VistA that may trigger updating open EWL entries if applicable and chosen by a user. Both single and multi appointment entries apply.
EWL	<p>Electronic Wait List VistA software package designed for recording, tracking and reporting veterans unable to acquire appropriate appointments within a specific VA medical center.</p> <p>The EWL may be used as a tool to avoid pre-scheduling clinics until the appropriate return interval, for example to track return appointment times for Advanced Clinic Access.</p>
MAKE/CREATE or SCHEDULE APPOINTMENT	Scheduling options which provide users the ability to schedule veterans for specific clinic appointments. Those options also allow veterans to be placed on the Electronic Wait List if no appointment meets the veteran appointment criteria.
NON-REMOVAL REASONS	Optional reasons, identified in the DO NOT REMOVE REASON field that may be entered for a particular EWL entry that has not been closed.
SA: REMOVED/SCHEDULED- ASSIGNED	One of reasons for disposition of open EWL entry. If this reason is selected the field related to corresponding appointment are filed into the EWL entry,
SD	Refers to VistA's Scheduling Package
SD EWL BACKGROUND UPDATE	EWL Mail Group used for notifications from running the background job; it was introduced in patch SD*5.3*327
STOP CODE or SPECIALTY	Treatment code used for reporting procedure performed during veterans visit. Three digit code numbers assigned to specific location. Each stop code number represents a type of care or Service/treating Specialty (clinics only). This is a required field in the Hospital Location file (clinic).

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